

# How To Successfully Migrate Your Data From Parting Pro to Gather

	<h2>Specify and Assess Your Migration Needs</h2> <p>When switching to Gather, assess what historical data you need to be migrated to the new system using Page 2 in this guide. Please note: because you're moving to an entirely new system, your migrated data will be displayed differently in Gather, and will take some time to get used to.</p>
	<h2>Establish a Cut-Off Date From Your Old System</h2> <p>Work with your new account manager at Gather to establish a cut-off date where your team will stop entering cases in Parting Pro, and begin entering new cases in Gather. We do not migrate multiple times, so plan accordingly with this date, and be sure to get your trainings completed in a timely manner.</p>
	<h2>Request an Export and Provide Your Parting Pro Login</h2> <p>Communicate with your Gather account manager and provide your login. Communicate with your Parting Pro account manager and request a <b>complete</b> backup file export of your data. Once you receive the export, forward the data backup to your new account manager at Gather.</p>
	<h2>Be Patient, Data Migration Takes Time + Effort</h2> <p>Data migration requires your collaboration. If you commit to completing this project, data migration can be completed within 2-4 business weeks. The timeline is based upon several factors, including receiving your data backup, the size of your migration, and can not be finished until you stop using your old system.</p>
	<h2>Review + Validate Your Migrated Data</h2> <p>Our team will conduct a mini migration (~15 cases). We need you to review the mini migration and validate the data being migrated from Parting Pro to Gather. Once our data team has your approval, we'll complete the rest of the migration and ask you to review one last time. And just like that, you're ready to go!</p>

# What Data Should You Migrate From Parting Pro to Gather?

## Yes, We Can Do That



### Basic Case Data

Includes basic case info for migrated cases (case number, case type, creation date, death date, case name, SSN, gender).

## Yes, But Please Note



### Custom Case Notes

All custom notes for a specific case are migrated as one consolidated custom note that is attached to the respective case in Gather. Does not include historical email threads.



### Relationships or Helpers

Contact info for all recorded informants and relationships for each case (name, email, phone, relationship to decedent).



### Case Financials

Includes contracts and logged payments for each case. A digital PDF of the case's existing contract or statement is attached to the case's files in Gather.



### Case Files

Includes any case files or completed digital forms attached to each case.

## Unable to Migrate



### Case Vitals

Since Parting Pro doesn't have a specific section for vitals, case vitals aren't always recorded fully, so case vitals are unable to be migrated accurately.



### Existing Accounts Receivable

Includes any existing cases that still owe on their statement or contract. We recommend that you collect, close out, or manually move your current Accounts Receivable.



### Case Events

Includes events tied to a specific case such as the arrangement meeting, scheduled funeral services, scheduled viewings, and more.



### Rolodex Information

Organizes rolodex info to store contact info for individuals/organizations.